



# Employee Self-Service Job Aid

## ESS How to View the Benefits Summary

### Topic Overview

The purpose of this Job Aid is to walk through the process on how to review the information on the **Benefits Summary** page in Employee Self-Service

### Table of Contents

Viewing the Benefits Summary .....	2
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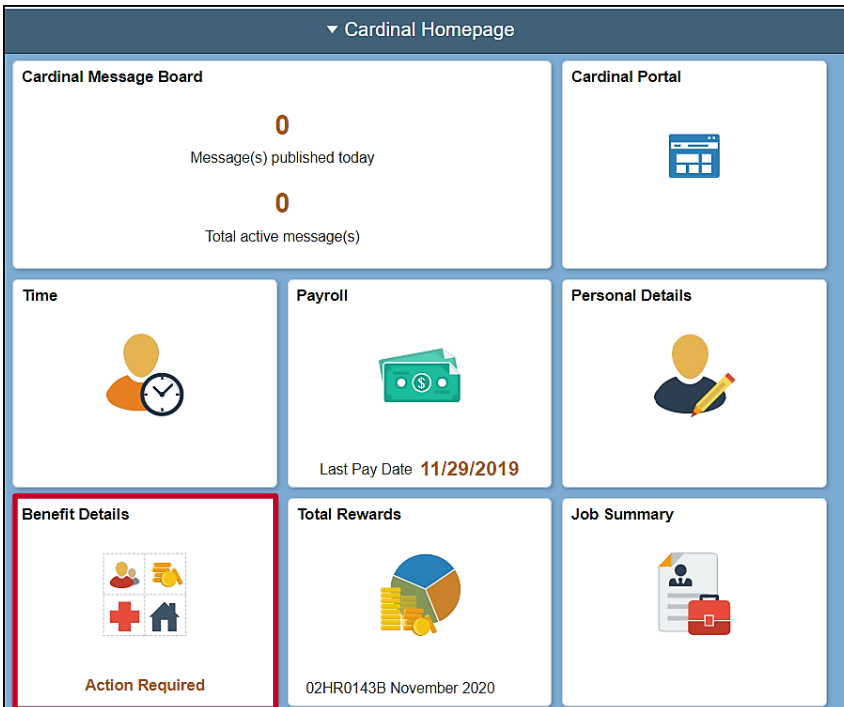
# Employee Self-Service Job Aid

## ESS How to View the Benefits Summary

### Viewing the Benefits Summary

1. Navigate to the **Cardinal Homepage**.

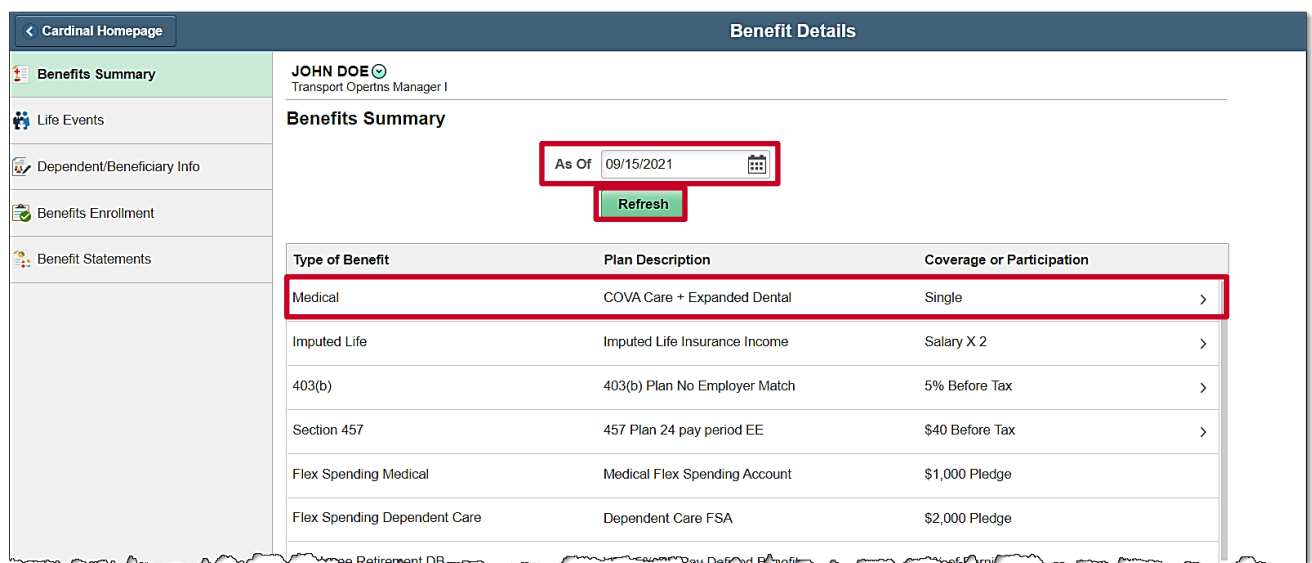
The **Cardinal Homepage** displays.



**Note:** Tile availability and placement on the Cardinal Homepage for each user is dependent upon their individual user and security settings.

2. Click the **Benefit Details** tile.

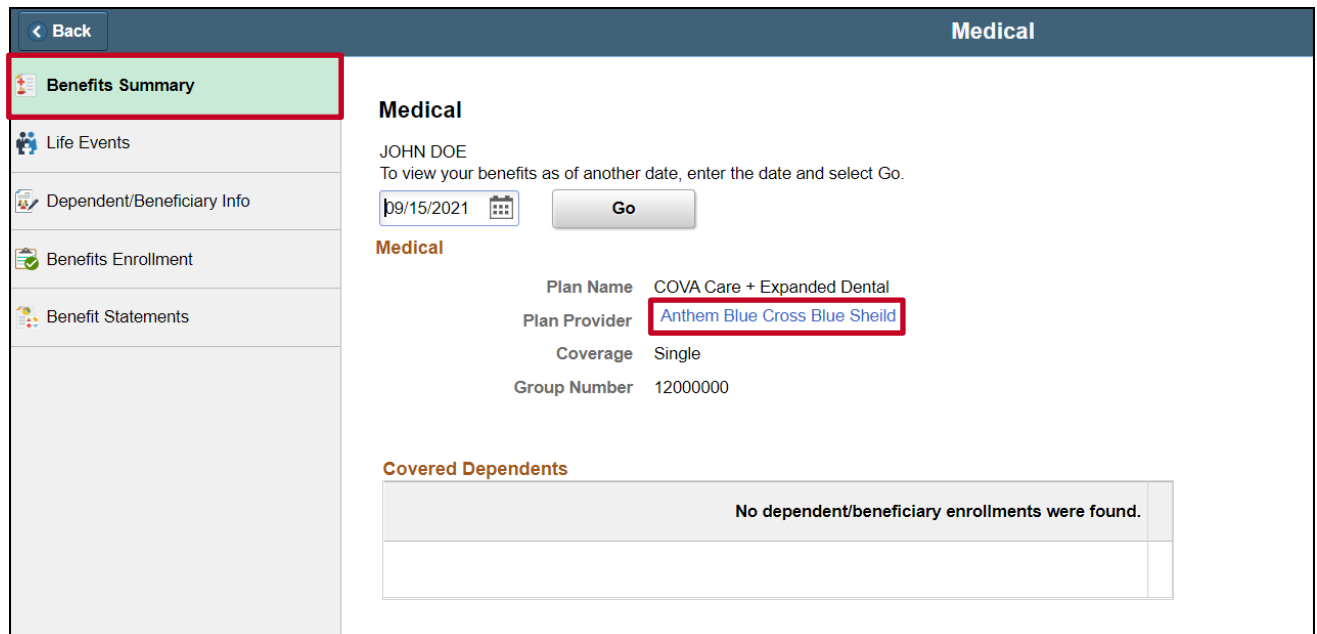
The **Benefits Details** page displays with the **Benefits Summary** tab displayed by default.



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3. The **As Of** field defaults to the current date and the page displays the current benefit enrollments. To search for historical or future benefit enrollment information, change the as of date using the **As Of Calendar** icon, then click the **Refresh** button.
4. Review the summary information as needed.
5. The corresponding **Expand** icon (>) to the far right of the row provides additional detail for each certain types of benefits listed. Click the corresponding **Expand** icon (>) for the desired Benefit Plan (Medical in this example).

The **Medical** page displays details of the Medical Benefit Plan you are enrolled in.



The screenshot shows the 'Medical' page in the Employee Self-Service system. On the left is a navigation menu with options: 'Benefits Summary' (highlighted with a red box), 'Life Events', 'Dependent/Beneficiary Info', 'Benefits Enrollment', and 'Benefit Statements'. The main content area is titled 'Medical' and shows details for 'JOHN DOE'. It includes a date selector set to '09/15/2021' and a 'Go' button. Below this, the 'Medical' section lists: Plan Name 'COVA Care + Expanded Dental', Plan Provider 'Anthem Blue Cross Blue Shield' (highlighted with a red box), Coverage 'Single', and Group Number '12000000'. At the bottom, the 'Covered Dependents' section shows a message: 'No dependent/beneficiary enrollments were found.'

6. Review the enrollment information as needed.
 

**Note:** The **Plan Provider** link will open the Vendor Webpage and additional information about the coverage can be reviewed. If the employee had dependents covered in their medical plan, they would be available for review in the **Covered Dependents** section.
7. Click the **Benefits Summary** list item to return to the **Benefits Summary** page and review additional benefit information as needed.



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The **Benefits Summary** page displays.

[← Cardinal Homepage](#)

Benefit Details

Benefits Summary

Life Events

Dependent/Beneficiary Info

Benefits Enrollment

Benefit Statements

JOHN DOE

Transport Opertns Manager I

Benefits Summary

As Of 09/15/2021

Refresh

Type of Benefit	Plan Description	Coverage or Participation
Medical	COVA Care + Expanded Dental	Single >
Imputed Life	Imputed Life Insurance Income	Salary X 2 >
403(b)	403(b) Plan No Employer Match	5% Before Tax >
Section 457	457 Plan 24 pay period EE	\$40 Before Tax >
Flex Spending Medical	Medical Flex Spending Account	\$1,000 Pledge
Flex Spending Dependent Care	Dependent Care FSA	\$2,000 Pledge

- Repeat these steps to view additional information pertaining to other Benefit Plans.